Corporate Human Resource Information System (CHRIS) Business Improvement Team (BIT)

SUBTEAM: CUSTOMIZATION CONTROL PROCEDURES

Background

The CHRIS Steering Committee has approved the concept of a formal customization control board to review proposed changes to CHRIS. The Steering Committee also asked the BIT to develop a formal definition of what constitutes a system modification so that we could assist in developing thresholds for the customization control board on what sorts of decisions need to be approved by the Steering Committee and what sorts of decisions can be made directly by the customization control board. This will be a moving threshold as the Steering Committee gains more comfort with the nature of the requests and the operation of the customization control board.

The Customization Control Board has met and has agreed to keep the CHRIS Steering Committee appraised of all customization requests and their disposition. As a result of this meeting, the Board is now empowered to make determinations on those customization requests which are of low impact to the system as well as for those that are a result of changes in regulation or legal authorities. At this point, all other matters will be referred to the Steering Committee, however once all members of both entities are more comfortable with making these determinations, the CCB will make more and more of the decisions, while the Steering Committee will only be involved in matters which reflect major changes in how DOE does business.

Customization Control Board Membership

Todd Turner, HQ
Janet Dubbert, FERC
Theda Badgy, HQ
George Hofman, HQ
Sharon Mills, FETC

Customization Definitions

Following is an attempt to define and categorize typical software customizations. The list is not all inclusive.

Examples of <u>low threshold modifications</u>:

C   Changing the length of a field
C   Changing the position of a field on a screen
C   Changing the appearance of a field (hiding/graying) on a screen

C   Adding a field to a record and then to a panel (screen)

Examples of <u>high threshold modifications</u>:

C   Changing the security to drive by POI
C   Changing SF-50/SF-52 printing to use different fields
C   Adding Validation tables (with their respective values)
C   Changing or adding the salary or benefits calculations
C   Adding functionality for daily salaries.
C   Writing sophisticated interfaces to other systems.
C   Adding extra work flow functionality (version 5.2)

Examples of changes that <u>do not constitute modifications</u>:

C   Changing default values
C   Adding (or deleting) values in existing validation tables

Suggested Business Rule for Customization

Most PSFT clients strive to stay `vanilla' as much as possible - to the point that it almost becomes a `bragging' rite at the Users Conference. Although this scenario is ideal (especially when upgrading or migrating their PSFT application), it is difficult to achieve a perfect `vanilla' implementation.

Customers must balance the additional functionality of a modification to the upgrading/maintainability of these changes.

The following strategy is recommended:

C   Strive for a vanilla implementation - but be prepared to modify the application. Know ahead of time that you will probably not have a perfect `vanilla' implementation - and this IS OK!

C   If changes are necessary, document them thoroughly - internally to the application using appropriate naming conventions and externally (a separate document for posterity reasons). The following process is recommended for submitting proposed customization changes:
1. Person initiating the proposed change will submit the CHRIS Customization Request form to the HR POC, after first obtaining a control number from the CHRIS Customization Control Log, located on the CHRIS home page.
2. The HR POC will then refer the proposal to the appropriate team - either the Implementation Team or the BIT.
3. The appropriate CHRIS Team Chair will staff the customization request to team members for study and analysis, coordinating with otehr teams as necessary. Full consensus of the appropriate team is required before the proposal will be brought before the CCB by the Team Leader of that team. A formal recommendation for approval or

denial of the customization request will be prepared by the Team Chair for full CCB consideration, complete with all alternatives.

4. The Team Chair will present the team's recommendations to the full CCB.

5. The CCB will approve low threshold changes; high threshold changes will be referred to the Steering Committee with recommendations for action. An appropriate response communicating the outcome of the decision making process will then be made to the individual requesting the customization. If not approved, the requestor is provided the decision and supporting reasons, and the package is returned. If approved, the customization change is documented bythe Dataabse Administrator, ad the CCB prepares an authroization to implement the changewhich include sthe approved technical apporach, implementation schedule, and asociated impacts to cost and schedule. Notification is snet to the CHRIS points of contact throughout DOE for assistance in implementation such as resources, training, and other support required to make the change.

6. Complete documentation of this process will be required at all levels.

C   Define the reasons for the modifications and then allow the developers to use their best judgment on the actual modifications. For example: if there is a decision to change fields from the JobCode_tbl to the Position_Data table, then a functional justification (business rule) should be written outlining the reasons WHY there should be a modification. This justification should be approved by the customization control board and/or steering committee.

There will be two parts to this functional justification: the **business assessment** and the **technical assessment**. The **business assessment** will focus primarily on the cultural changes required by the proposed change and should take into consideration existing reengineering efforts currently being undertaken as well as any applicable business case analyses. Included in this assessment will be a synopsis of the change, the driver for that change (regulatory, agency or local policy, bargaining unit agreement, or local need), the customer requirements and expectations, and time sensitivities (including whether not approving this change will prevent implementation of PS). Additionally, this assessment should include an analysis of the implications of approving or not approving this change on both local operations and on other DOE operations as well as any internal reengineering efforts. This analysis should look at the BIT efforts as well and whether this proposed change is already in the works.

The **technical assessment** will focus primarily on the technical implications this change will have and should take into consideration the impact on current and future operations, priorities, long-range CHRIS strategy, and the impact of customization on future direction and plans for added functionality, especially with future releases of PS. The following type of information will need to be provided by the IM POC or other database administrator or corporate staff: the technical impact of the proposed change on the system, cost estimates for implementing the change (including staff hours), any approved implementation schedules (would it be better to wait for the next PS release and will this change be in that release?), any impact this change would have administration-wide, and the impact of this change on future releases and system functionality, especially when it is time for upgrade to a new release.

These two assessments will permit the CCB to evaluate customization requests from a business driven aspect while at the same time address their feasibility, cost, and timeliness, and, if necessary, make recommendations to the Steering Committee. After approval by the appropriate group, the developers will then design and program the modifications - with a sincere effort to minimize the modifications.

C   The individual modifications required to support the business rule should NOT need to be approved by the customization control board and/or steering committee since the original functional justification will have already been approved.

Attachment 1: Customization Request Form
Attachment 2: Customization Control Log
Attachment 3: Flow diagram